

COUNTY OF SAN DIEGO – DEPARTMENT OF PURCHASING AND CONTRACTING
CONTRACT NO. 547132 AMENDMENT NO. 5

To **Community Research Foundation, Inc.** Pursuant to the contract changes clause, you are directed to make the changes described herein to the Contract or do the following described work not included in the previous agreed on Statement of Work.

Title of Program: **Psychiatric Emergency Response Team Services (PERT)**

Effective Date: **August 1, 2015**

Description of Contract Change(s) and/or Work To Be Done:

This amendment adds Public Safety Group funding in the amount of \$733,333 for August 1, 2015 through June 30, 2016, and \$800,000 per year for the subsequent contract option years to support five (5) additional PERT teams in the Sheriff's jurisdiction and staff equipment. This amendment also revises language in Exhibit A, Statement of Work.

1. Amend Exhibit A, Statement of Work as follows:

- a. Replace Section 3.1.3, now reads: "Contractor shall provide 9,174 crisis intervention contacts and 11,649 community service contacts during the fiscal year, for a combined total of 20,823 contacts."
- b. Delete Section 3.1.4, and renumber remaining sections.
- c. Replace Section 3.1.7 (formerly 3.1.8) which now reads: "Contractor shall provide training to a minimum of 85 families, clients, providers, and police dispatchers combined, to appropriately respond and interact with law enforcement in the event a mental health crisis arises to the level that 911 emergency assistance is needed."
- d. Add Section 5.1.10 which reads: "Contractor shall perform linkage and referrals to community-based organizations including, but not limited to, primary care clinics and complementary healing centers, faith-based congregations, ethnic organizations and peer-directed programs such as Clubhouses."
- e. Replace Section 6.6, now reads: "Contractor shall enter data within 48 hours of occurrence in the County designated Management Information (MIS) system. (See 3.1.4)."

	Contract Term	Current Contract Amount	Amendment Amount	New Amended Total
Initial Contract Term	1/01/14 – 6/30/14	\$1,464,261		\$1,464,261
Option Year One	7/01/14 – 6/30/15	\$2,752,104		\$2,752,104
Option Year Two	7/01/15 – 6/30/16	\$3,552,104	\$733,333	\$4,285,437
Option Year Three	7/01/16 – 6/30/17	\$3,552,104	\$800,000	\$4,352,104
Option Year Four	7/01/17 – 6/30/18	\$3,552,104	\$800,000	\$4,352,104
Option Year Five	7/01/18 – 6/30/19	\$3,552,104	\$800,000	\$4,352,104
Option Year Six	7/01/19 – 6/30/20	\$3,552,104	\$800,000	\$4,352,104
Total cumulative contract amount	1/01/14 – 6/30/20	\$21,976,885	\$3,933,333	\$25,910,218

f.

2. Amend the compensation clause to add \$733,333 for August 1, 2015 through June 30, 2016 and \$800,000 for each subsequent option year, for a total increase of \$3,933,333 (see chart below):
3. Revised Exhibit A, Statement of Work and Exhibit C, FY 15-16 Budget are attached. Changes to Exhibit A are noted by a line in the right margin.

All other Terms and Conditions remain the same.

IN WITNESS WHEREOF, County and Contractor have executed this Amendment effective as of the date first set forth above.

We, the undersigned Contractor, have given careful consideration to the change proposed and hereby agree, if this proposed change is approved, that we will provide all equipment, furnish all materials, except as may otherwise be noted above, and perform all services necessary for the work specified herein, and will accept as full payment an increase of \$733,333 for August 1, 2015 to June 30, 2016 for an amended FY 15-16 price of \$4,285,437 and \$800,000 for each of the subsequent option years, for a total increase of \$3,933,333.

Contract time for completion remains unchanged.

Revised Contract Total Price is \$25,910,218.

By: 

LINDA HAMMOND, President
Community Research Foundation, Inc.
1202 Morena Blvd., Suite 300
San Diego, CA 92110

Date: 7-23-15

**THIS AMENDMENT IS NOT VALID UNLESS SIGNED
BY THE DEPARTMENT OF PURCHASING AND
CONTRACTING.**

Department Review and Recommended Approval:

By: 

ELIZABETH (BETSY) KNIGHT,
Behavioral Health Program Coordinator
Behavioral Health Services

Date: 7/30/15

APPROVED:

By: 

JOHN M. PELLEGRINO, Director
Department of Purchasing and Contracting

Date: 7/30/15

**COUNTY OF SAN DIEGO, HEALTH AND HUMAN SERVICES AGENCY
COUNTY CONTRACT NUMBER 547132 WITH COMMUNITY RESEARCH FOUNDATION FOR
PSYCHIATRIC EMERGENCY RESPONSE TEAM (PERT) SERVICES
EXHIBIT A – STATEMENT OF WORK**

1. SCOPE OF WORK

The Psychiatric Emergency Response Team (PERT) contributes to the well-being of individuals experiencing a mental health crisis who have come in contact with law enforcement, as described in Paragraph 4, Target Population. PERT has been designed to improve collaboration between the behavioral health and law enforcement systems with the goal of more humane and effective handling of incidents involving law enforcement officers and individuals with mental illness, developmental disabilities and /or substance use disorders. Services should address the following basic functions:

- Provide mental health and substance use consultation, case coordination, linkage and limited crisis intervention services to clients who come in contact with law enforcement officers;
- Develop and provide a training program for law enforcement personnel for the purpose of improving their ability to identify and effectively intervene with individuals with mental illness, developmental disabilities and /or substance use disorders;
- Develop a data system which will facilitate a detailed analysis of the community service needs of individuals with mental illness, developmental disabilities and /or substance use disorders who come in contact with law enforcement officers that will complement the San Diego County Behavioral Health Services MIS system;
- Develop a neighborhood/community outreach program involving the neighborhood police teams, local business organizations and citizens; and
- Provide program coverage seven days a week from 6:00 a.m. to midnight. Note: Days and hours are subject to change based on law enforcement needs and calls for service.

2. BACKGROUND

The Adult & Older Adult Behavioral Health Services System of Care is based on Biopsychosocial and Rehabilitation (BPSR) principles that have proven to be effective in reducing psychiatric hospitalization and assisting mental health participants to become more productive community members. For more information, visit the link located at: https://uspra.ipower.com/Certification/USPRA_CORE_PRINCIPLES2009.pdf.

- 2.1 California voters approved Proposition 63, Mental Health Services Act (MHSA), in 2004. The MHSA increased funding for the community mental health system and laid the groundwork for the transformation of the mental health service delivery system from a "fail first" system, to one that promotes early intervention and recovery. All MHSA programs are wellness-focused, client/family-driven, and designed to create integrated service experiences while demonstrating cultural competency and community collaboration. The goal is to increase access to unserved and underserved individuals and families by reducing disparities in the service system. The MHSA is comprised of five components of services and/or program supports for which the funding established may be spent: Community Services and Supports (CSS), Workforce Education and Training (WET), Capital Facilities and Technological Needs (CF/TN), Prevention and Early Intervention (PEI), and Innovation (INN) Programs.
- 2.2 County and Health and Human Services Agency (HHS) Strategic Initiatives: As part of the County's General Management System and Strategic Plan, this competitive procurement process will be an important part of the County's strategic initiative of Promoting Safe and Livable Communities by improving access to Mental Health Services. This innovative program will increase access to care by strategically engaging participants who are reluctant or avoidant of mental health treatment in voluntary outpatient mental health treatment programs.

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The County's Strategic Plan is located at: http://www.sdcountry.ca.gov/dmpr/gfx/CAO_Strategic_Plan/.

The County's General Management System is at:
<http://www.co.san-diego.ca.us/cao/docs/completegms.pdf>.

- 2.3 *Live Well San Diego* (LWSD) was developed by the County of San Diego as a comprehensive, innovative strategy on wellness. This long-term plan combines the efforts of partners inside and outside County government to help all residents be healthy, safe, and thriving. All HHSA contractors, to the extent feasible, are expected to advance this initiative, which is being implemented in a phased approach. The first phase, Building Better Health, was adopted by the Board of Supervisors in 2010, and focuses on improving the health of residents and supporting healthy choices. The second phase, Living Safely, seeks to ensure residents are protected from crime and abuse, neighborhoods are safe, and communities are resilient to disasters and emergencies. The third phase, Thriving, focuses on promoting a region in which residents can enjoy the highest quality of life.

Information about the initiative can be found on the County's website and a website designated to the initiative:

http://www.sdcountry.ca.gov/hhsa/programs/sd/live_well_san_diego/index.html and

<http://www.LiveWellSD.org>

LWSD outcomes for this Statement of Work may be found in the following paragraphs: 3.1.1, 3.1.2, 3.1.3, 3.1.4, 3.1.6, 3.1.8, and 3.1.9.

3. OUTCOME OBJECTIVES

- 3.1 Outcome objectives – Contractor shall achieve the following outcome objectives:

- 3.1.1. PERT Interventions: At a minimum, 75% or greater, PERT intervention cases shall result in de-escalation of violence to self, others or property as measured by data collected for each PERT intervention (3.1.5).
- 3.1.2. 50% or greater PERT interventions result in avoided hospitalization or incarceration.
- 3.1.3. Contractor shall provide 9,174 crisis intervention contacts and 11,649 community service contacts during the fiscal year, for a combined total of 20,823 contacts.
 - 3.1.3.1. Crisis intervention contacts are defined as a response to an unplanned event enabling client to cope with a crisis while maintaining his/her status as a functioning community member to the greatest extent possible.
 - 3.1.3.2. Community Service contacts are defined as mental health services that are provided in the community at large and are generally intended to be outreach activities to persons or organizations.
- 3.1.4. PERT clinicians shall document the immediate outcome of the PERT intervention including the clients' disposition, demographic information, the client's level of violence and to whom the client was referred by entering the information into the Management Information System designated by the County.
- 3.1.5. PERT Training: 85% of Contractor distributed course evaluations shall indicate increased knowledge of the subject matter covered by the training. When course evaluation results fall below 85%, Contractor shall review and evaluate the training curriculum and evaluations received from the training participants to identify and implement improvements to the training.
- 3.1.6. Contractor shall obtain distributed course evaluations and as appropriate, administer pre and post-tests for all law enforcement training sessions or training modules.

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- 3.1.7. Contractor shall provide training to a minimum of 85 families, clients, providers, and police dispatchers combined, to appropriately respond and interact with law enforcement in the event a mental health crisis arises to the level that 911 emergency assistance is needed.
- 3.1.8. Contractor shall provide training to the following populations:
 - 3.1.8.1. Five (5) PERT Academy trainings with capacity to serve seventy-five (75) individuals at each training.
 - 3.1.8.2. Ten (10) 8-hour trainings for law enforcement with a capacity to serve Fifty (50) individuals at each training.
 - 3.1.8.3. Two Crisis Response Trainings (CRT) for San Diego Police Department with the capacity to serve fifty (50) individuals at each training.
 - 3.1.8.4. One Advanced 16-hour training with the capacity to serve twenty-five (25) individuals at each training.
 - 3.1.8.5. One 8-hour training for Fire/Paramedics with the capacity to serve twenty-five (25) individuals at each training.
 - 3.1.8.6. One 8-hour training for probation/parole with the capacity to serve twenty-five (25) individuals at each training.
 - 3.1.8.7. One 8-hour refresher training with the capacity to serve twenty-five (25) individuals at each training.
 - 3.1.8.8. Four (4) Police Academy training with the capacity to serve twenty-five (25) individuals at each training.

4. TARGET POPULATION AND GEOGRAPHIC AREA

Contractor shall provide Countywide services to individuals with a behavioral health crisis who have come in contact with local law enforcement agencies and/or who need immediate mental health crisis intervention and/or assessment. Contractor shall focus on sub-specialty relationships with Transitional Age Youth (TAY) and Older Adult populations in the community. Contractor shall provide services to the citizens residing in underserved communities and to San Diego County's military Veteran population.

5. GENERAL REQUIREMENTS FOR SERVICE DELIVERY

5.1 Crisis Intervention and Client Services

- 5.1.1. Contractor shall provide, operate and maintain a Psychiatric Emergency Response Team in collaboration with County's Mental Health Plan and law enforcement agencies throughout San Diego County.
- 5.1.2. Contractor shall provide culturally relevant services for the target population (as described in Paragraph 4) through the operation of PERT.
- 5.1.3. Contractor shall provide mobile crisis interventions to individuals who are experiencing a mental health crisis when they come in contact with law enforcement.
- 5.1.4. Contractor shall provide mental health support services/consultations to law enforcement agencies throughout the County.
- 5.1.5. Contractor shall refer and link individuals to needed services.
- 5.1.6. Contractor shall reduce inappropriate hospitalization and/or incarceration for clients and to refer the client to the most appropriate, least restrictive mental health program.

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- 5.1.7. Contractor shall provide direct client interventions in conjunction with law enforcement officers.
 - 5.1.8. Contractor shall provide client follow up services as appropriate. Follow ups shall include services to high risk individuals who have limited or no connection with the behavioral health system in San Diego or who are experiencing a lengthy delay in obtaining the services they need, individuals who are elderly, psychotic, suicidal or homicidal but do not need inpatient criteria at the time of contact or who were taken to a hospital by PERT and recently released. PERT team shall provide up to three follow ups as appropriate based on a determination by the PERT team and verbal permission from the client. Four or more follow up services must be approved by the Contractor's Executive Director who will render additional assistance to facilitate linkage and admission to appropriate providers.
 - 5.1.9. Contractor's program and services shall be trauma-informed and accommodate the vulnerabilities of trauma survivors and allow services to be delivered in a way that will avoid inadvertently re-traumatizing people and will facilitate consumer participation in services.
 - 5.1.10. Contractor shall perform linkage and referrals to community-based organizations including, but not limited to, primary care clinics and complementary healing centers, faith-based congregations, ethnic organizations and peer-directed programs such as Clubhouses.
- 5.2 Training and Community Outreach
- 5.2.1. Contractor shall recruit, train, and provide on-going training for clinical staff.
 - 5.2.2. Contractor shall ensure provision of training for law enforcement and clinical PERT staff regarding mental health and related topics and developmental disabilities.
 - 5.2.3. Contractor shall conduct monthly "Roundtable" meetings for local law enforcement, providers and clinicians in geographical locations to ensure countywide coverage. At a minimum, the geographic locations shall include: North, Central, East and South. Contractor shall attend mandatory meetings as directed by COR with local agencies as they pertain to PERT and the community, including: LPS, Hospital Partners, Public Safety meeting, and Mental Health Advisory Board (MHAB) and Alcohol and Drug Advisory Board (ADAB) meetings. Contractor will be notified by the County if additional meetings are required in response to an emergency situation or unforeseen circumstance.
 - 5.2.4. Contractor shall provide a minimum of quarterly training days for law enforcement and PERT program clinicians, to include topics relevant to PERT services such as: Policy and Procedure review, discussion Operational and Clinical scenarios between clinicians and law enforcement, in-services training from referral sources, etc.
 - 5.2.5. Contractor shall provide a minimum of quarterly training days to law enforcement. Quarterly training may include the PERT Academy, Treatments and Medications, Cultural Awareness, etc.
 - 5.2.6. Contractor shall provide quarterly Patient Advocate training to law enforcement and PERT program clinicians.
 - 5.2.7. Contractor shall provide education and information outreach programs, including a minimum of six presentations, about PERT to the public agencies, local business organizations, residents and community members.
 - 5.2.8. Contractor shall provide education, training, and support to law enforcement and other community mental health providers to help serve individuals who are in crisis and in need of mental health services.

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- 5.2.9. Contractor shall provide a minimum of quarterly presentations about PERT to providers, such as client run clubhouses, hospitals, schools, public service clubs, community mental health programs.
- 5.2.10. Contractor shall maintain an up-to-date listing of community resources adequate to meet the needs of target population.
- 5.2.11. Contractor shall adhere to all County required training requirements.

5.3 Staffing and County Requirements

- 5.3.1. Contractor shall develop internal written policies, procedures and protocols for all mental health client services.
- 5.3.2. Contracted staff providing direct services to mental health clients shall be licensed/registered practitioners in the State of California.
- 5.3.3. Contracted staff shall have experience, education and training to serve and meet the needs of the target population.
- 5.3.4. Contractor shall be notified by the County in advance of any required training. County may provide notification to the Contractor of all trainings via email to a designee of the Contractor.
- 5.3.5. Contractor shall develop and sign Memoranda of Understanding/Partnership Agreements (MOU/PA) within first thirty (30) days of contract execution with law enforcement agencies and other appropriate agencies to outline each agency's role in connection with the PERT program. Contractor may use existing, signed MOU/PAs that address the needs of the services and functions of this program. Contractor shall provide the COR with copies of each signed MOU/PA related to the PERT program.
- 5.3.6. Clinical Staff Association (CSA): Contractor shall support the activity of the San Diego County Behavioral Health Services Clinical Staff Association (CSA) by disseminating material and releasing staff to attend meetings, as resources permit.
- 5.3.7. Contractor shall recognize that the County of San Diego has the following scheduled holidays and County agencies may be difficult to contact:

New Year's Day	Labor Day
Martin Luther King Day	Thanksgiving Day
Presidents' Day	Friday following Thanksgiving
Easter	Veteran's Day
Memorial Day	Christmas Day
Independence Day	
- 5.3.8. Disaster Response: In the event that a local, state, or federal emergency is proclaimed within San Diego County, Contractor shall respond in accordance with Organizational Provider Operations Handbook located at the TRL.
- 5.3.9. Contractor shall comply with all applicable provisions of the Organizational Provider Operations Handbook and its appendices, located at the Technical Resource Library which will be updated periodically.

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- 5.3.10. Contractor shall comply with all applicable provisions of the Organizational Provider Financial Eligibility and Billing Procedures Manual located at the Technical Resource Library, which will be updated periodically.
- 5.3.11. Contractor shall comply with all applicable provisions of the Adult & Older Adult Mental Health Documentation and Uniform Clinical Records Manual, located at the Technical Resource Library, which will be updated periodically.
- 5.3.12. Technical Resource Library (TRL) is located at:
http://www.sdcountry.ca.gov/hhsa/programs/bhs/mental_health_services_act/technical_resource_library.html
- 5.3.13. Contractor shall adhere to funding source regulations and outcomes, including, but not limited to MHSA, PATH, and SAMHSA. COR shall identify applicable funding source regulations and outcomes at commencement of contract and whenever funding source regulations and outcomes change.
- 5.3.14. Communication and Coordination
- 5.3.14.1. Contractor shall obtain, provide, utilize, and maintain capacity to communicate in a timely fashion, returning messages within 24 hours with the COR via all of the following: electronic mail (e-mail), fax, telephone and voice mail.
- 5.3.14.2. Contractor shall participate in scheduled provider meetings to further the development of an integrated system of care.
- 5.3.15. Program Management
- 5.3.15.1. Contractor shall provide Program Management, which includes business and administrative planning, organizing, directing, coordinating, and approving actions designed to accomplish overall program objectives.
- 5.3.15.2. Contractor shall identify lead Program Manager to provide administrative and clinical leadership, be responsible for the day-to-day operations of the program, and be accessible to Adult & Older Adult Behavioral Health Services (BHS) by telephone and by e-mail during program's regular office hours.
- 5.3.15.3. Contractor shall provide COR an organizational chart identifying key personnel and reporting relationships when contract is executed, and within 72 hours of any changes to organizational structure.
- 5.3.15.4. Contractor shall notify COR prior to personnel change in Program Manager Position (or its equivalent).
- 5.3.15.5. A written plan for program coverage and personnel transition shall be submitted to Adult & Older Adult BHS at least 72 hours prior to any personnel change in Program Manager Position.
- 5.3.15.6. Resume of candidate for replacement shall be submitted to COR for Adult & Older Adult BHS review and comment at least 72 hours prior to hiring.
- 5.3.16. Client Rights: Contractor shall comply with Federal, State and County requirements regarding client rights, including grievances and appeals, as described in the Organizational Provider Operations Handbook located at the TRL.
- 5.3.17. Cultural Competence: Contractor shall comply with cultural competence requirements as referenced in the Organizational Provider Operations Handbook and shall demonstrate

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integration of cultural competence standards described in the San Diego County Behavioral Health Services (SDCMHS) Cultural Competence (CC) Plan located at the TRL.

5.3.17.1. Contractor shall provide a Human Resource Plan that includes how Contractor shall recruit, hire and retain bilingual and culturally diverse staff.

5.3.17.2. Contractors shall provide a CC Plan that is consistent with the SDCMHS CC Plan 2010. This may be the Legal Entity's CC Plan.

5.3.17.3. Contractor shall identify a process to determine bilingual proficiency of staff at a minimum in the threshold languages for the County which include English, Spanish, Tagalog, Vietnamese and Farsi.

5.3.17.4. Contractor shall use the Culturally Competent Program Annual Self-Evaluation (CC-PAS) and the California Brief Multi-Cultural Competency Scale (CBMCS) as tools to determine the levels of cultural competency as a provider and staff person, respectively. These tools are found in the Organizational Provider Operations Handbook and also located at the TRL (http://www.sdcountry.ca.gov/hhsa/programs/bhs/mental_health_services_act/technical_resource_library.html). COR shall advise the Contractor when there is a need to use other evaluation tools.

5.3.17.5. 100% of staff shall participate in at least four (4) hours of cultural competence training per fiscal year.

5.3.17.6. Culturally and Linguistically-Appropriate Services (CLAS): To ensure equal access to quality care by diverse populations, each service provider receiving funds from this contract shall adopt the federal Office of Minority Health (OMH) Culturally and Linguistically-Appropriate Service (CLAS) national standards. The National CLAS standards are located at:

<http://minorityhealth.hhs.gov/templates/browse.aspx?lvl=2&lvlid=15>

5.3.18. Co-Occurring Initiative: Contractor shall support the County of San Diego's Co-Occurring Initiative and adopt the Comprehensive, Continuous, Integrated System of Care (CCISC) model that espouses a treatment and recovery philosophy and promotes the integrated treatment of participants with mental illness and substance use issues. When applicable, or as determined by the COR, Contractor shall be dually capable through compliance with all applicable provisions in the Organizational Provider Operations Handbook.

5.3.19. Compliance Program: At all times during the term of this contract, Contractor shall maintain a compliance program in accordance with the Organizational Provider Operations Handbook located at the TRL.

5.3.20. Quality Improvement: Contractor shall comply with AOABHS Quality Improvement Program provisions, as described in Organizational Provider Operations Handbook located at the TRL, may include, but not be limited to: Client Outcomes; MHSA Outcomes; Serious Incident Reporting; and Program Status Report.

5.3.21. Utilization Management: Contractor shall perform Utilization Management activities in accordance with Organizational Provider Operations Handbook located at the TRL.

5.3.22. Traffic Violations: Contractor shall not allow transporting participants any person convicted of any serious traffic violation, including, but not limited to, violations listed below:

5.3.22.1. Any combination of Driving Under the Influence or Failure to Appear which totals more than two in the past five years;

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- 5.3.22.2. At fault Hit and Run accident in the past five years;
- 5.3.22.3. At fault accidents which total more than three in the past five years;
- 5.3.22.4. Reckless Driving offenses, which total more than two in the past five years.
- 5.3.23. Criminal Background Clearance: Contractor shall comply with all applicable provision of Article 16 section 21 of the Pro Forma Agreement.
 - 5.3.23.1. Contractor's Staff: Contractor's employees, consultants, volunteers, who work on this contract and work directly with minors, shall have clearances for work with minors completed by the Contractor prior to employment and annually thereafter as defined in the Organizational Provider Operations Handbook.
- 5.3.24. Contractor and its agents and employees are subject to and shall comply with the Child Abuse Reporting Law (California Penal Code section 11164) and Adult Abuse Reporting Law (California Welfare and Institutions Code section 15630):

6. DATA COLLECTION AND REPORTING REQUIREMENTS

- 6.1 Contractor shall collect and enter the following data into the County designated Management Information System (MIS) system:
 - 6.1.1. Client demographics (including age, sex, ethnicity, etc.);
 - 6.1.2. Date and time of contact;
 - 6.1.3. Description of the incident;
 - 6.1.4. Client disposition and level of violence; and
 - 6.1.5. Action taken and to whom the client was referred.
 - 6.1.6. Contractor shall comply with applicable Organizational Provider Operations Handbook provisions including, but not limited to: Data Collection; Accuracy of Data; Financial Eligibility and Billing Procedures; Medi-Cal Administrative Activity (MAA); and Additional Outcome Measures.
- 6.2 Contractor shall document any consultation, training and client services in accordance with policy and procedures for Outreach/Community Services.
- 6.3 Contractor shall record all direct and indirect client contacts on the Client/Data Entry Form, or an alternative-form approved by the COR.
- 6.4 Program Status Reports
 - 6.4.1. Format of the Program Status Report shall be as directed by Adult & Older Adult BHS and shall include information as included in the Status Report template.
 - 6.4.2. Compliance shall be measured by accurate completion of all sections of each report and by timely submission.
 - 6.4.3. Data collection as requested by the County to include:
 - 6.4.3.1. Use of instruments determining outcome objectives as directed by the County.
 - 6.4.3.2. Monthly or quarterly reporting as requested by the COR of results for outcome objectives.
 - 6.4.3.3. Additional outcomes may be identified by the Department of Health Care Services (DHCS) and will be included as required. Contractor shall utilize designated database to record and track outcomes, if deemed mandatory buy the County and COR.

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6.4.3.4. Ad hoc reporting as required.

- 6.5 Budget Reporting: Contractor shall report separately on MHSA, MIS MHSA, and Non-MHSA budgets per guidelines in Exhibit C.
- 6.6 Contractor shall enter data within 48 hours of occurrence in the County designated Management Information (MIS) system. (See 3.1.4).
- 6.7 Critical Incident Reporting: Contractor shall report Critical Incidents according to the policy and procedure in the Organization Provider Operations Handbook. Contractor shall report critical Incidents to the COR within 24 hrs of occurrence.

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Budget Summary Page

This budget will remain in effect throughout the entire contract term unless amended or revised through AAR.

Contractor: Community Research Foundation

Budget Period: 07/01/15 - 06/30/16

Contract #: 547132

Amendment #: 5

Program Name	TOTAL	PERT Core	PERT MHSA	PERT MHSA Training	PERT Sheriff Public Safety Group	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME
Funding Source/Population		SDMC	MHSA	MHSA	Public Safety Group	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE
1 Salaries and Benefits (Schedule I)	3,266,715.45	1,206,162.85	1,417,461.91	77,236.13	565,834.75								
2 Operating Expense (Schedule II)	461,615.04	100,647.83	131,116.96	157,684.99	72,165.26	-	-	-	-	-	-	-	-
3 *Fixed Assets (Supplemental A)	-	-	-	-	-	-	-	-	-	-	-	-	-
4 *Indirect Cost (Schedule III)	557,106.65	195,273.52	231,396.84	35,103.16	95,333.33	-	-	-	-	-	-	-	-
5 GROSS COST	4,285,437.34	1,502,104.00	1,779,975.71	270,024.29	733,333.34	-	-	-	-	-	-	-	-
6 Less: Contract Revenues													
7 Participant Fees	-												
8 Other Patient Insurance	-												
9 Medicare	-												
10 Other Revenues: (Specify)	-												
11 TOTAL CONTRACT REVENUES	-	-	-	-	-	-	-	-	-	-	-	-	-
12 NET COST (CONTRACT MAX)	4,285,437.34	1,502,104.00	1,779,975.71	270,024.29	733,333.34	-	-	-	-	-	-	-	-

FUNDING SOURCE	TOTAL	PERT Core	PERT MHSA	PERT MHSA Training	Public Safety Group	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME
13 SDMC FFP	415,547.97	203,441.19	104,105.02	-	108,001.76	-	-	-	-	-	-	-	-
14 PATH	-												
15 SAMHSA	-												
16 MHSA	1,945,894.98		1,575,870.69	270,024.29									
17 MH Other Discretionary	1,923,994.39	1,298,662.81			625,331.58								
18 ADS DMC	-												
19 ADS DMC AB0109	-												
20 AB109	-												
21 SAPT Primary Prevention	-												
22 SAPT HIV	-												
23 GP	-												
23 ADS Other	-												
24 TOTAL	4,285,437.34	1,502,104.00	1,779,975.71	270,024.29	733,333.34	-	-	-	-	-	-	-	-

CONTROL CHECK	-	-	-	-	-	-	-	-	-	-	-	-	-
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I certify that the deliverables and/or services were budgeted specifically for this contract in accordance with the terms and conditions set forth therein and the budgeted costs reported align with the current Cost Allocation Plan on file.

Contractor's Authorized Signature

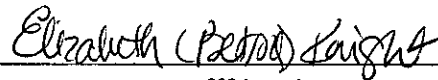


Date: 07/30/15

Type Name and Title

Bob Marchetti, Chief Financial Officer

Approved By:



Date: 7/31/15

(For County Use Only)

COR Approval

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Budget Summary Page - Mental Health Projected Units Data

Contractor: Community Research FoundationBudget Period: 07/01/15 - 06/30/16Contract #: 547132Amendment #: 5

Service Function Code	TOTAL	SFC1	SFC2	SFC3	SFC4	SFC5	SFC6	SFC7	SFC8	SFC9	SFC10
Service Function Description		202 MAA Referral in Crisis	205 MAA Mental Health Outreach	Non-MAA BS Comm Serv	PERT	Academy					
PROGRAM NAME: PERT Core FUNDING SOURCE: SD/MC											
Gross Cost (Line 5 Budget Summ Amt)	1,502,104.00	232,504.22	174,378.17	140,948.83	954,272.79	-	-	-	-	-	-
Other Revenues	-	-	-	-	-	-	-	-	-	-	-
Net Cost	1,502,104.00	232,504.22	174,378.17	140,948.83	954,272.79	-	-	-	-	-	-
Total Units of Service	9,191	2,163	1,622	5,406	-	-	-	-	-	-	-
Cost per Units of Service		107.49	107.51	26.07							
Total Billing Units	667,489	283,288	212,466	171,735	-	-	-	-	-	-	-
Cost per Billing Units		0.82	0.82	0.82							
Standard Rate or CMA		2.11	2.11	2.11	-	-	-	-	-	-	-
Total SD/MC Billing Units-Traditional (50% FFP)	495,754	283,288	212,466	-	-	-	-	-	-	-	-
Total SD/MC Billing Units-PPACA (65% FFP)	-	-	-	-	-	-	-	-	-	-	-
Total SD/MC Billing Units-PPACA (100% FFP)	-	-	-	-	-	-	-	-	-	-	-
Total SD/MC Billing Units	495,754	283,288	212,466	-	-	-	-	-	-	-	-
Percentage of total SD/MC to total billing units	74%	100%	100%	0%							
FFP revenue - traditional (50% FFP)	203,441.19	116,252.11	87,189.08	-							
FFP revenue - PPACA, etc (65% FFP)	-	-	-	-							
FFP revenue - PPACA, etc (100% FFP)	-	-	-	-							
TOTAL FFP Revenue	203,441.19	116,252.11	87,189.08	-	-	-	-	-	-	-	-
PROGRAM NAME: PERT MHSA FUNDING SOURCE: MHSA											
Gross Cost (Line 5 Budget Summ Amt)	1,779,975.71	287,675.52	215,756.43	179,508.05	1,097,035.71	-	-	-	-	-	-
Other Revenues	-	-	-	-	-	-	-	-	-	-	-
Net Cost	1,779,975.71	287,675.52	215,756.43	179,508.05	1,097,035.71	-	-	-	-	-	-
Total Units of Service	10,689	2,515	1,886	6,288	-	-	-	-	-	-	-
Cost per Units of Service		114.38	114.40	28.55							
Total Billing Units	823,992	347,091	260,318	216,583	-	-	-	-	-	-	-
Cost per Billing Units		0.83	0.83	0.83							
Standard Rate or CMA		2.11	2.11	2.11	-	-	-	-	-	-	-
Total SD/MC Billing Units-Traditional (50% FFP)	251,213	143,550	107,663	-	-	-	-	-	-	-	-
Total SD/MC Billing Units-PPACA (65% FFP)	-	-	-	-	-	-	-	-	-	-	-
Total SD/MC Billing Units-PPACA (100% FFP)	-	-	-	-	-	-	-	-	-	-	-
Total SD/MC Billing Units	251,213	143,550	107,663	-	-	-	-	-	-	-	-
Percentage of total SD/MC to total billing units	30%	41%	41%	0%							
FFP revenue - traditional (50% FFP)	104,105.02	59,488.46	44,616.56	-							
FFP revenue - PPACA, etc (65% FFP)	-	-	-	-							
FFP revenue - PPACA, etc (100% FFP)	-	-	-	-							
TOTAL FFP Revenue	104,105.02	59,488.46	44,616.56	-	-	-	-	-	-	-	-

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Budget Summary Page - Mental Health Projected Units Data

Contractor: Community Research FoundationBudget Period: 07/01/15 - 06/30/16Contract #: 547132Amendment #: 5

Service Function Code	TOTAL	SFC1	SFC2	SFC3	SFC4	SFC5	SFC6	SFC7	SFC8	SFC9	SFC10
Service Function Description		202 MAA Referral in Crisis	205 MAA Mental Health Outreach	Non-MAA 65 Comm Serv	PERT	Academy					
PROGRAM NAME: PERT MHSA Training	FUNDING SOURCE: MHSA										
Gross Cost (Line 5 Budget Summ Amt)	270,024.29	-	-	-	-	270,024.29					
Other Revenues	-	-	-	-	-	-					
Net Cost	270,024.29	-	-	-	-	270,024.29	-	-	-	-	-
Total Units of Service	-										
Cost per Units of Service											
Total Billing Units	-										
Cost per Billing Units											
Standard Rate or CMA											
Total SD/MC Billing Units-Traditional (50% FFP)	-										
Total SD/MC Billing Units-PPACA (65% FFP)	-										
Total SD/MC Billing Units-PPACA (100% FFP)	-										
Total SD/MC Billing Units	-	-	-	-	-	-	-	-	-	-	-
Percentage of total SD/MC to total billing units											
FFP revenue - traditional (50% FFP)	-										
FFP revenue - PPACA, etc (65% FFP)	-										
FFP revenue - PPACA, etc (100% FFP)	-										
TOTAL FFP Revenue	-	-	-	-	-	-	-	-	-	-	-
PROGRAM NAME: PERT Sheriff Public Safety Group	FUNDING SOURCE: Public Safety Group										
Gross Cost (Line 5 Budget Summ Amt)	733,333.34	123,430.63	92,572.89	76,235.32	441,094.50	-					
Other Revenues	-	-	-	-	-	-					
Net Cost	733,333.34	123,430.63	92,572.89	76,235.32	441,094.50	-	-	-	-	-	-
Total Units of Service	4,552	1,071	803	2,678	-						
Cost per Units of Service		115.25	115.28	28.47							
Total Billing Units	339,875	143,550	107,663	88,662	-						
Cost per Billing Units		0.86	0.86	0.86							
Standard Rate or CMA		2.11	2.11	2.11	-						
Total SD/MC Billing Units-Traditional (50% FFP)	251,213	143,550	107,663	-	-						
Total SD/MC Billing Units-PPACA (65% FFP)	-										
Total SD/MC Billing Units-PPACA (100% FFP)	-										
Total SD/MC Billing Units	251,213	143,550	107,663	-	-	-	-	-	-	-	-
Percentage of total SD/MC to total billing units	74%	100%	100%	0%							
FFP revenue - traditional (50% FFP)	108,001.76	61,715.32	46,286.44	-							
FFP revenue - PPACA, etc (65% FFP)	-	-	-	-							
FFP revenue - PPACA, etc (100% FFP)	-	-	-	-							
TOTAL FFP Revenue	108,001.76	61,715.32	46,286.44	-	-	-	-	-	-	-	-

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Schedule I - Salaries and Benefits

Salaries & Benefits Total 3,266,715.78

Contractor: Community Research Foundation

Contract #: 547132

Amendment # 5

Program: PERT Core

Funding Source: SD/MC

State Provider Code: 37- DN

Budget Period: 07/01/15 - 06/30/16

Address: 1094 Cudahy Place, Ste 314 San Diego, CA 92110

D/M-C Provider Code:

Position	PROPOSED BUDGET					PRIOR APPROVED BUDGET					NET CHANGE / INCREASE (DECREASE)				
	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense
Director	-	0.30	115,000.01	12.00	34,997.84	-	0.49	113,295.69	12.00	55,231.65	-	(0.18)	1,704.32	-	(20,233.71)
Law Enforcement Liaison/Community Outreach Coordinator	-	0.36	73,120.00	12.00	26,550.11	-	0.50	72,080.00	12.00	36,040.00	-	(0.14)	1,040.00	-	(9,489.89)
Assitant Director	-	0.38	83,200.00	12.00	31,296.30	-	-	-		-	-	0.38	83,200.00	12.00	31,296.30
Office Manager	-	0.38	39,520.00	12.00	14,665.74	-	0.50	37,440.00	12.00	18,720.00	-	(0.12)	2,080.00	-	(3,854.26)
Admin Asst/Med Records Specialist	-	0.38	37,440.00	12.00	14,083.33	-	0.50	35,360.00	12.00	17,680.00	-	(0.12)	2,080.00	-	(3,596.67)
Admin Asst/Med Records Specialist	-	0.38	35,360.00	12.00	13,300.93	-	-	-		-	-	0.38	35,360.00	12.00	13,300.93
Team Leader	0.75	0.25	74,880.00	12.00	74,880.00	0.75	0.25	74,880.00	12.00	74,880.00	-	-	-	-	-
Team Leader	0.75	0.25	74,880.00	12.00	74,880.00	0.75	0.25	74,880.00	12.00	74,880.00	-	-	-	-	-
Clinician	1.00	-	66,352.00	12.00	66,352.00	1.00	-	66,352.00	12.00	66,352.00	-	-	-	-	-
Clinician	1.00	-	65,312.00	12.00	65,312.00	1.00	-	65,312.00	12.00	65,312.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	66,352.00	12.00	66,352.00	1.00	-	66,352.00	12.00	66,352.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Salary and Wages Subtotal					997,046.34					989,623.65					7,422.69
Employee Benefits					209,136.31					208,788.83					347.48
SALARY & BENEFITS SUBTOTAL	12.50	2.67			1,206,182.65	12.50	2.49			1,198,412.48	-	0.18			7,770.17

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES
Exhibit C Schedule I - Salaries and Benefits

Contractor:	Community Research Foundation	Contract #:	547132	Amendment #:	5
Program:	PERT MHSA	Funding Source:	MHSA	State Provider Code: 37-	DN
Budget Period:	07/01/15 - 06/30/16	Address:	1094 Cudahy Place, Ste 314 San Diego, CA 92110	D/M-C Provider Code:	0

Position	PROPOSED BUDGET					PRIOR APPROVED BUDGET					NET CHANGE / INCREASE (DECREASE)				
	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense
Director	-	0.36	115,000.01	12.00	40,830.93	-	0.49	113,295.69	12.00	55,231.65	-	(0.13)	1,704.32	-	(14,400.72)
Law Enforcement Liaison/Community Outreach Coordinator	-	0.42	73,120.00	12.00	30,879.82	-	0.50	72,080.00	12.00	36,040.00	-	(0.08)	1,040.00	-	(5,160.18)
Assistant Director	-	0.44	83,200.00	12.00	36,400.00	-	-	-	-	-	-	0.44	83,200.00	12.00	36,400.00
Office Manager	-	0.44	39,520.00	12.00	17,290.00	-	0.50	37,440.00	12.00	18,720.00	-	(0.06)	2,080.00	-	(1,430.00)
Admin Asst/Med Records Specialist	-	0.44	37,440.00	12.00	16,380.00	-	0.50	35,360.00	12.00	17,680.00	-	(0.06)	2,080.00	-	(1,300.00)
Admin Asst/Med Records Specialist	-	0.44	35,360.00	12.00	15,470.00	-	-	-	-	-	-	0.44	35,360.00	12.00	15,470.00
Team Leader	0.75	0.25	74,880.00	12.00	74,880.00	0.75	0.25	74,880.00	12.00	74,880.00	-	-	-	-	-
Team Leader	0.75	0.25	74,880.00	12.00	74,880.00	0.75	0.25	74,880.00	12.00	74,880.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Team Leader	0.75	0.25	78,000.00	12.00	78,000.00	1.00	-	64,272.00	12.00	64,272.00	(0.25)	0.25	13,728.00	-	13,728.00
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Training Coordinator	-	-	-	-	-	1.00	-	64,272.00	12.00	64,272.00	(1.00)	-	(64,272.00)	(12.00)	(64,272.00)
Clinician	2.00	-	67,136.00	12.00	134,272.00	1.00	-	64,272.00	12.00	64,272.00	1.00	-	2,864.00	-	70,000.00
Clinician	1.00	-	64,272.00	12.00	64,272.00	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-
Clinician	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-	1.00	-	64,272.00	12.00	64,272.00
Clinician	1.00	-	64,272.00	12.00	64,272.00	-	-	-	-	-	1.00	-	64,272.00	12.00	64,272.00
Clinician	1.00	-	70,000.00	12.00	70,000.00	-	-	-	-	-	1.00	-	70,000.00	12.00	70,000.00
Clinician	1.00	-	70,000.00	12.00	70,000.00	-	-	-	-	-	1.00	-	70,000.00	12.00	70,000.00
Clinician	1.00	-	70,000.00	12.00	70,000.00	-	-	-	-	-	1.00	-	70,000.00	12.00	70,000.00
Clinician Overtime Pool	0.29	-	70,000.00	12.00	20,192.31	-	-	-	-	-	0.29	-	70,000.00	12.00	20,192.31
Salary and Wages Subtotal	1,199,379.05					791,607.65					407,771				
Employee Benefits	218,082.86					188,876.35					29,207				
SALARY & BENEFITS SUBTOTAL	14.54	3.28				1,417,461.91	9.50	2.49				980,484.00	5.04	0.79	436,978

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Schedule I - Salaries and Benefits

Contractor:	Community Research Foundation	Contract #:	547132	Amendment #:	5
Program:	PERT MHSA Training	Funding Source:	MHSA	State Provider Code: 37-	DN.
Budget Period:	07/01/15 - 06/30/16	Address:	1094 Cudahy Place, Ste 314 San Diego, CA 92110	D/M-C Provider Code:	0

Position	PROPOSED BUDGET					PRIOR APPROVED BUDGET					NET CHANGE / INCREASE (DECREASE)				
	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense
Director	-	0.16	115,000.00	12.00	18,400.00	-	-	-	-	-	-	0.16	115,000.00	12.00	18,400.00
Law Enforcement Liaison/Community Outreach Coordinator	-	0.03	73,120.00	12.00	2,537.56	-	-	-	-	-	-	0.03	73,120.00	12.00	2,537.56
Assistant Director	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Training Coordinator	-	1.00	41,600.00	12.00	41,600.00	-	-	-	-	-	-	1.00	41,600.00	12.00	41,600.00
Office Manager	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Admin Asst/Med Records Specialist	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Admin Asst/Med Records Specialist	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Salary and Wages Subtotal					62,537.56					-					62,537.56
Employee Benefits					14,698.57					-					14,698.57
SALARY & BENEFITS SUBTOTAL	-	1.19			77,236.13	-	-			-	-	1.19			77,236.13

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Schedule I - Salaries and Benefits

Contractor:	Community Research Foundation	Contract #:	547132	Amendment #:	5
Program:	PERT Sheriff Public Safety Group	Funding Source:	Public Safety Group	State Provider Code: 37-	
Budget Period:	07/01/15 - 06/30/16	Address:		D/M-C Provider Code:	

Position	PROPOSED BUDGET					PRIOR APPROVED BUDGET					NET CHANGE / INCREASE (DECREASE)				
	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense	Direct FTE	Admin FTE	Annual Salary (full time)	# of months	Total Salary Expense
Director	-	0.16	114,999.97	12.00	18,471.00					-	-	0.16	114,999.97	12.00	18,471.00
Team Leader	0.75	0.25	78,000.00	12.00	78,000.00					-	0.75	0.25	78,000.00	12.00	78,000.00
Training Coordinator	-	-	-	-	-					-	-	-	-	-	-
Clinician	1.00	-	70,000.00	12.00	70,000.00					-	1.00	-	70,000.00	12.00	70,000.00
Clinician	1.00	-	70,000.00	12.00	70,000.00					-	1.00	-	70,000.00	12.00	70,000.00
Clinician	1.00	-	70,000.00	12.00	70,000.00					-	1.00	-	70,000.00	12.00	70,000.00
Clinician	1.00	-	70,000.00	12.00	70,000.00					-	1.00	-	70,000.00	12.00	70,000.00
Clinician Overtime Pool	1.44	-	70,000.00	12.00	100,962.00					-	1.44	-	70,000.00	12.00	100,962.00
					-					-	-	-	-	-	-
Salary and Wages Subtotal					477,433.00					-					477,433.00
Employee Benefits					88,402.08					-					88,402.08
SALARY & BENEFITS SUBTOTAL	6.19	0.41			565,835.08	-	-			-	6.19	0.41			565,835.08

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Schedule II- Operating Expense

Contractor: Community Research Foundation

Budget Period: 07/01/15 - 06/30/16

Contract #: 547132

Amendment #: 5

NOTE: The number of Cost Centers must match the services as contracted. Also, use only approved Cost Center names and use additional pages as needed to avoid using unreadable font sizes.

Program Name Funding Source/Population	PROPOSED BUDGET	PRIOR APPROVED BUDGET	NET CHANGE/ INCREASE (DECREASE)	PERT Core			PERT MHSA		
				SD/MC			MHSA		
				Proposed Budget	Prior Approved	Increase/ (Decrease)	Proposed Budget	Prior Approved	Increase/ (Decrease)
1 *Consultants (from Supplemental B)	30,500.00	20,500.00	10,000.00	-	10,250.00	(10,250.00)	-	10,250.00	(10,250.00)
2 **Flex Fund	-	-	-	-	-	-	-	-	-
3 *Gift Cards	-	-	-	-	-	-	-	-	-
4 *Interest Expense	-	-	-	-	-	-	-	-	-
5 *Leasehold Improvements	-	-	-	-	-	-	-	-	-
6 *Subcontracts (from Supplemental B)	-	-	-	-	-	-	-	-	-
7 Building Rent & Leases	71,630.00	28,560.00	43,070.00	22,205.00	14,280.00	7,925.00	25,787.00	14,280.00	11,507.00
8 Building Repairs/Maintenance	12,247.00	5,800.00	6,447.00	3,917.00	2,900.00	1,017.00	4,546.00	2,900.00	1,646.00
9 Depreciation	-	-	-	-	-	-	-	-	-
10 Equipment Rent & Leases	7,714.00	5,763.00	1,951.00	2,796.00	3,227.00	(431.00)	3,333.00	2,536.00	797.00
11 Equipment Repair/Maintenance	3,900.00	900.00	3,000.00	1,209.00	504.00	705.00	1,404.00	396.00	1,008.00
12 Telecommunications	44,772.00	35,036.00	9,736.00	15,336.00	17,752.00	(2,416.00)	21,660.00	17,284.00	4,376.00
13 Utilities	7,600.00	2,800.00	4,800.00	2,356.00	1,400.00	956.00	2,736.00	1,400.00	1,336.00
14 Medical Supplies	-	-	-	-	-	-	-	-	-
15 Minor Equipment	76,663.86	480.00	76,183.86	14,253.72	240.00	14,013.72	34,348.46	240.00	34,108.46
16 Office Supplies	14,719.00	9,676.00	5,043.00	4,328.00	4,838.00	(510.00)	4,853.00	4,838.00	15.00
17 Other Supplies	5,917.00	5,732.00	185.00	1,889.00	2,866.00	(977.00)	2,136.00	2,866.00	(730.00)
18 Printing	15,457.00	3,456.00	12,001.00	1,071.00	1,728.00	(657.00)	1,245.00	1,728.00	(483.00)
19 Drug Testing	-	-	-	-	-	-	-	-	-
20 Laboratory Services/non-drug testing	-	-	-	-	-	-	-	-	-
21 Pharmaceutical	-	-	-	-	-	-	-	-	-
22 24 Hour Program: Food	-	-	-	-	-	-	-	-	-
23 24 Hour Program: Personal Needs Items	-	-	-	-	-	-	-	-	-
24 Client Transportation	-	-	-	-	-	-	-	-	-
25 Travel	14,550.00	4,800.00	9,750.00	5,400.00	2,400.00	3,000.00	5,400.00	2,400.00	3,000.00
26 Accounting/Auditing/Legal Fees	6,773.00	10,000.00	(3,227.00)	2,717.00	5,000.00	(2,283.00)	2,181.00	5,000.00	(2,819.00)
27 Dues and Subscriptions	1,716.00	1,377.00	339.00	732.00	756.00	(24.00)	859.00	621.00	238.00
28 Insurance	23,234.85	31,016.00	(7,781.35)	9,704.05	15,508.00	(5,803.95)	6,727.80	15,508.00	(8,780.20)
29 Staff Development/Training/Education	10,788.00	43,074.00	(32,286.00)	3,344.00	21,537.00	(18,193.00)	3,884.00	21,537.00	(17,653.00)
30 Tax/License/Fees	9,905.33	664.00	9,241.33	3,605.46	332.00	3,273.46	2,454.10	332.00	2,122.10
31 Other Business Services	103,528.20	5,800.00	97,728.20	5,784.60	2,900.00	2,884.60	7,562.60	2,900.00	4,662.60
32 Interpreter Services	-	-	-	-	-	-	-	-	-
Operating Expenses Total	461,615.04	215,434.00	246,181.04	100,647.83	108,418.00	(7,770.17)	131,116.96	107,016.00	24,100.96

* May not be exceeded without prior HHSA approval.

** Funded line item maybe exceeded up to \$1,000. Excess more than \$1,000 will require COR preapproval

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Schedule II- Operating Expense

Contractor: Community Research Foundation

Budget Period: 07/01/15 - 06/30/16

Contract #: 547132

Amendment #: 5

NOTE: The number of Cost Centers must match the services as contracted. Also, use only approved Cost Center names and use additional pages as needed to avoid using unreadable font sizes.

Program Name	PERT MHSA Training			PERT Sheriff Public Safety Group			PROGRAM NAME		
Funding Source/Population	MHSA			Public Safety Group			FUNDING SOURCE		
	Proposed Budget	Prior Approved	Increase/ (Decrease)	Proposed Budget	Prior Approved	Increase/ (Decrease)	Proposed Budget	Prior Approved	Increase/ (Decrease)
1 *Consultants (from Supplemental B)	30,500.00		30,500.00			-			-
2 **Flex Fund	-		-			-			-
3 *Gift Cards	-		-			-			-
4 *Interest Expense	-		-			-			-
5 *Leasehold Improvements	-		-			-			-
6 *Subcontracts (from Supplemental B)	-		-			-			-
7 Building Rent & Leases	12,177.00		12,177.00	11,461.00		11,461.00			-
8 Building Repairs/Maintenance	1,773.00		1,773.00	2,011.00		2,011.00			-
9 Depreciation	-		-	-		-			-
10 Equipment Rent & Leases	328.00		328.00	1,257.00		1,257.00			-
11 Equipment Repair/Maintenance	663.00		663.00	624.00		624.00			-
12 Telecommunications	1,848.00		1,848.00	5,928.00		5,928.00			-
13 Utilities	1,292.00		1,292.00	1,216.00		1,216.00			-
14 Medical Supplies	-		-	-		-			-
15 Minor Equipment	7,087.49		7,087.49	20,974.19		20,974.19			-
16 Office Supplies	1,510.00		1,510.00	4,028.00		4,028.00			-
17 Other Supplies	223.00		223.00	1,669.00		1,669.00			-
18 Printing	12,587.00		12,587.00	554.00		554.00			-
19 Drug Testing	-		-	-		-			-
20 Laboratory Services/non-drug testing	-		-	-		-			-
21 Pharmaceutical	-		-	-		-			-
22 24 Hour Program: Food	-		-	-		-			-
23 24 Hour Program: Personal Needs Items	-		-	-		-			-
24 Client Transportation	-		-	-		-			-
25 Travel	150.00		150.00	3,600.00		3,600.00			-
26 Accounting/Auditing/Legal Fees	25.00		25.00	1,850.00		1,850.00			-
27 Dues and Subscriptions	25.00		25.00	100.00		100.00			-
28 Insurance	75.00		75.00	6,727.80		6,727.80			-
29 Staff Development/Training/Education	1,834.00		1,834.00	1,726.00		1,726.00			-
30 Tax/License/Fees	67.50		67.50	3,778.27		3,778.27			-
31 Other Business Services	85,520.00		85,520.00	4,661.00		4,661.00			-
32 Interpreter Services	-		-	-		-			-
Operating Expenses Total	157,684.99	-	157,684.99	72,165.26	-	72,165.26	-	-	-

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Schedule III- Indirect Cost

Contractor: Community Research FoundationBudget Period: 07/01/15 - 06/30/16Contract #: 547132Amendment #: 5

Program Name	TOTAL	PERT Core	PERT MHSA	PERT MHSA Training	PERT Sheriff Public Safety Group	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME	PROGRAM NAME
Funding Source/Population		SD/MC	MHSA	MHSA	Public Safety Group	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE	FUNDING SOURCE
Salaries and Benefits	3,266,715.45	1,206,182.65	1,417,461.91	77,236.13	565,834.75	-	-	-	-	-
Operating Expense	461,615.04	100,647.83	131,116.96	157,684.99	72,165.26	-	-	-	-	-
Fixed Asset	-	-	-	-	-	-	-	-	-	-
Total Direct Cost (S&B, Operating Expense & Fixed Assets)	3,728,330.49	1,306,830.48	1,548,578.87	234,921.13	638,000.01	-	-	-	-	-
Less: Subcontract over \$25,000	-									
Less: Other Distorting Items	-									
Gross Direct Cost Net of Distorting Items	3,728,330.49	1,306,830.48	1,548,578.87	234,921.13	638,000.01	-	-	-	-	-
Indirect Cost	557,106.85	195,273.52	231,396.84	35,103.16	95,333.33					
Indirect Cost Rate (based on Net Direct Cost)	14.94%	14.94%	14.94%	14.94%	14.94%					
Indirect Cost Rate (based on Salaries and Benefits)	17.05%	16.19%	16.32%	45.45%	16.85%					
Indirect Cost Rate (based on Operating Expenses)	120.69%	194.02%	176.48%	22.26%	132.10%					

Number of Estimated Indirect FTE

4.67

Have Federal Approved Indirect Rate?

☐ YES☒ NO

If YES, indicate Rate

INDIRECT COST METHODOLOGY (Please check one)

☒ Using methodology described in Submitted Cost Allocation Plan (CAP)☐ Using Federal Approved Indirect Rate

NOTE: Proposed indirect rate cannot exceed the federal approved indirect rate.

☐ Others - Describe method in the box below

OTHER INDIRECT COST METHODOLOGY

Describe departments/functions included in indirect costs
(e.g. HR, IT, QA, etc.)Administration, Support, Finance, Human
Resources, Information Technology, Quality
Assurance

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C Supplemental B - Subcontract Agreements

Contractor:	<u>Community Research Foundation</u>	Contract #:	<u>547132</u>	Amendment #:	<u>5</u>
Program:	<u>PERT MHSA Training</u>	Funding Source:	<u>MHSA</u>	State Provider Code: 37-	<u>DN</u>
Budget Period:	<u>07/01/15 - 06/30/16</u>	Address:	<u>1094 Cudahy Place, Ste 314 San Diego, CA 92110</u>	D/M-C Provider Code:	<u>0</u>

REMINDER: Submit all Subcontract agreements to COR together with budget or no later than June 30. Remember to obtain written COR concurrence.

CONSULTANTS			PROPOSED BUDGET					PRIOR APPROVED BUDGET					NET CHANGE / INCREASE (DECREASE)				
NAME	AGENCY	POSITION CLASS	Direct Hrs	Admin Hrs	Rate	Direct Amount	Admin Amount	Direct Hrs	Admin Hrs	Rate	Direct Amount	Admin Amount	Direct Hrs	Admin Hrs	Rate	Direct Amount	Admin Amount
5, 3-day PERT Academies		Consult Trainer, daily rate			750.00	7,500.00	-			750.00	11,250.00	-	-	-	-	(3,750.00)	-
5, 3-day PERT Academies		Wayne Spees, daily rate			250.00	1,250.00	-			250.00	1,000.00	-	-	-	-	250.00	-
3, 1-day CRT SD Police Dept		Consult Trainer, daily rate			750.00	2,250.00	-			750.00	750.00	-	-	-	-	1,500.00	-
4, 4-hr Police Academy		Consult Trainer, daily rate			750.00	3,000.00	-			750.00	1,500.00	-	-	-	-	1,500.00	-
1, 8-hr Police/Paramedics		Consult Trainer, daily rate			750.00	750.00	-				-	-	-	-	750.00	750.00	-
2, 8-hr Probation		Consult Trainer, daily rate			750.00	1,500.00	-				-	-	-	-	750.00	1,500.00	-
1, 8-hr Refresher		Consult Trainer, daily rate			750.00	750.00	-			750.00	6,000.00	-	-	-	-	(5,250.00)	-
10, 8-hr Police Dispatch		Consult Trainer, daily rate			750.00	12,000.00	-				-	-	-	-	750.00	12,000.00	-
1, Advanced 16-hr class		Consult Trainer, daily rate			750.00	1,500.00	-				-	-	-	-	750.00	1,500.00	-
						-	-				-	-	-	-	-	-	-
TOTAL CONSULTANT COSTS			-	-		30,500.00	-	-	-		20,500.00	-	-	-		10,000.00	-
SUBCONTRACT			PROPOSED BUDGET					PRIOR APPROVED BUDGET					NET CHANGE / INCREASE (DECREASE)				
NAME	AGENCY	POSITION CLASS	Direct Hrs	Admin Hrs	Rate	Direct Amount	Admin Amount	Direct Hrs	Admin Hrs	Rate	Direct Amount	Admin Amount	Direct Hrs	Admin Hrs	Rate	Direct Amount	Admin Amount
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
						-	-				-	-	-	-	-	-	-
TOTAL SUBCONTRACT COSTS			-	-		-	-	-	-		-	-	-	-		-	-

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C - Contract Budget - Line Item Justification

Contractor: Community Research Foundation Contract #: 547132 Amendment #: 5
 Budget Period: 07/01/15 - 06/30/16 State Provider Code: 37- DN D/M-C Provider Code: 0

Background & Instructions: The following information is required of Contractor when submitting contract budgets adjustments and with new contracts.

LINE ITEM: Consultants (Services rendered by persons who are members of a particular profession or possess a special skill and who are not officers or employees of the contractor)	Total Amount \$ 30,500
(Provide a Brief Description & Justification): Academy trainers and Nami Speakers	
LINE ITEM: Building Rent or Lease **Rent <u>cannot</u> be claimed if you own the building**	Total Amount \$ 71,630
(Provide a Brief Description & Justification): Program space rent at 1094 Cudahy St; Rents at Murphy Canyon relocation site	
LINE ITEM: Building Repair & Maintenance	Total Amount \$ 12,247
(Provide a Brief Description/Justification): Building security and janitorial services. Contingency expenses.	
LINE ITEM: Equipment Rent & Lease (e.g., copiers, fax machines, vehicles, point-of-sale equipment, etc.)	Total Amount \$ 7,714
(Provide a Brief Description & Justification): Copier and postage machine leases	
LINE ITEM: Equipment Repair & Maintenance	Total Amount \$ 3,900
(Provide a Brief Description & Justification): Copier maintenance agreement. Info Tech service data maintenance	
LINE ITEM: Telecommunications (e.g., internet, telephone, long distance, cell phones, cable or satellite TV, etc.)	Total Amount

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C - Contract Budget - Line Item Justification

Contractor: Community Research Foundation Contract #: 547132 Amendment #: 5
Budget Period: 07/01/15 - 06/30/16 State Provider Code: 37- DN D/M-C Provider Code: 0

Background & Instructions: *The following information is required of Contractor when submitting contract budgets adjustments and with new contracts.*

LINE ITEM: Telecommunications (e.g., internet, telephone, long distance, cell phones, cable or satellite TV, etc.)	\$ 44,772
(Provide a Brief Description & Justification): Telepacific office land lines. AT&T aircards for mobile electronic health record charting. Clinician cell phone service.	

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C - Contract Budget - Line Item Justification

Contractor: Community Research Foundation Contract #: 547132 Amendment #: 5
 Budget Period: 07/01/15 - 06/30/16 State Provider Code: 37- DN D/M-C Provider Code: 0

Background & Instructions: The following information is required of Contractor when submitting contract budgets adjustments and with new contracts.

LINE ITEM: Utilities (e.g., gas, electricity, water, sewer, burglar alarm, etc.)	Total Amount \$ 7,600
(Provide a Brief Description & Justification): Electrical utility expense	
LINE ITEM: Minor Equipment (Item cost between \$100 - \$5,000)	Total Amount \$ 76,664
(Provide a Brief Description & Justification): Minor Equipment such as, bullet proof vests, laptops, desktops, office furniture, phones, or any piece of equipment with a cost that exceeds \$100	
LINE ITEM: Office Supplies	Total Amount \$ 14,719
(Provide a Brief Description & Justification): Miscellaneous office supplies, paper, pens, etc.; Laptop carrying case	
LINE ITEM: Other Supplies ***No food, beverages or food supplies***	Total Amount \$ 5,917
(Provide a Brief Description & Justification): Team shirts, miscellaneous supplies, cleaning supplies, restroom supplies	
LINE ITEM: Printing	Total Amount \$ 15,457
(Provide a Brief Description & Justification): Flyer and business cards, Academy training materials and packets	

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C - Contract Budget - Line Item Justification

Contractor:	Community Research Foundation	Contract #:	547132	Amendment #:	5
Budget Period:	07/01/15 - 06/30/16	State Provider Code: 37-	DN	D/M-C Provider Code:	0

Background & Instructions: The following information is required of Contractor when submitting contract budgets adjustments and with new contracts.

LINE ITEM: Travel (includes mileage reimbursement) ***Must adhere to GSA and IRS limits***	Total Amount
	\$ 14,550
(Provide a Brief Description & Justification): Based on the IRS' standard mileage reimbursement rate, reimburses employees for miles they drive in their own automobiles	

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C - Contract Budget - Line Item Justification

Contractor: Community Research Foundation Contract #: 547132 Amendment #: 5
 Budget Period: 07/01/15 - 06/30/16 State Provider Code: 37- DN D/M-C Provider Code: 0

Background & Instructions: The following information is required of Contractor when submitting contract budgets adjustments and with new contracts.

LINE ITEM: Accounting, Auditing and Legal Fees	Total Amount \$ 6,773
(Provide a Brief Description & Justification): Allocation of annual independent audit	
LINE ITEM: Dues & Subscription	Total Amount \$ 1,716
(Provide a Brief Description & Justification): Various professional association membership such as National Council on Alcohol and Drug Dep, MHA Corp of America.	
LINE ITEM: Insurance (e.g., worker's compensation, professional liability, etc.)	Total Amount \$ 23,235
(Provide a Brief Description & Justification): Prof Liability, HIPPA, Fiduciary, General Liab, Umbrella, Sexual Misconduct, Crime, Property	
LINE ITEM: Staff Training & Education ***Must benefit Contract/Program/Cost Center***	Total Amount \$ 10,788
(Provide a Brief Description & Justification): CPR Training, Self defense instructors, Training software used to manage professional development, cultural competency requirements, and violence prevention in the workplace trainings , MHR dinner	
LINE ITEM: Tax/Licenses/Fees (e.g., Professional Licenses, Memberships)	Total Amount \$ 9,905.33
(Provide a Brief Description & Justification): Based on the IRS' standard mileage reimbursement rate, reimburses employees for miles they drive in their own automobiles	

HEALTH AND HUMAN SERVICES AGENCY - BEHAVIORAL HEALTH SERVICES

Exhibit C - Contract Budget - Line Item Justification

Contractor: Community Research Foundation Contract #: 547132 Amendment #: 5
Budget Period: 07/01/15 - 06/30/16 State Provider Code: 37- DN D/M-C Provider Code: 0

Background & Instructions: The following information is required of Contractor when submitting contract budgets adjustments and with new contracts.

LINE ITEM: Other Business Services (e.g., printing, background check for employees/volunteers, recruitment, advertising, professional subscriptions, FedEx, UPS, US Postal Service, etc.) ***No business meals, food, beverages or food supplies***		Total Amount \$ 103,528
(Provide a Brief Description & Justification): Chart and record storage, checking account fees, Staff recruiting expense, PERT Academy training expenses, Marina Village Conference Center fees, NAMI Panelists		